

Missouri Charter Public School Commission (MCPSC)
Site Visit Protocol
Updated Fall 2022



Missouri

Charter Public School Commission

Table of Contents

Part I:	Introduction	3
Part II:	Roles and Responsibilities	4
Part III:	Process	8
Part IV:	Performance Criteria and Indicators	12
Appendix A:	Checklist for School Site Visit Coordinator	16
Appendix B:	Compliance Checklist	17
Appendix C:	Interview/Focus Groups Guides	20

Part I: Introduction

The Missouri Charter Public School Commission (MCPSC) started sponsoring charter schools in 2015. Lawmakers, charter school advocates, and education reformers wanted an independent sponsoring entity with the authority to sponsor high-quality charter schools throughout Missouri. Sponsors enter into a contract with a Missouri nonprofit organization that demonstrates the ability and capacity to operate a quality independent public school. Sponsors hold these schools accountable for the performance of the school and to the conditions of the contract.

This charter school site visit protocol is a guide for school leaders and members of the site visit team organized by the MCPSC. This protocol is based in part on the successful charter school program built by the Massachusetts Department of Elementary and Secondary Education (DOE). MCPSC extends its gratitude to the Massachusetts DOE for the use of its materials. The MCPSC Site Visit Protocol also contains elements of the MCPSC School Quality Review (SQR) developed by SchoolWorks, which is a process that educators can use to understand and explain how well schools are working to educate students. The SQR is based on a transparent, research-based set of standards that serve as the framework to understand the effectiveness of school practices.

This Protocol is designed to be a resource for charter school leaders, external site visitors, MCPSC staff, and contracted vendors who may conduct site visits for MCPSC. It explains site visit processes, roles and responsibilities of all parties, and expected outcomes. The Protocol is meant to provide useful information about site visits so stakeholders and visitors know what to expect and how to prepare. Information from focus groups, as well as document review, provides data that is analyzed to complete a written report.

Site visits and subsequent site visit reports are not intended to provide technical assistance or other advice to the school. The site visit is also not intended to directly assist schools in making decisions about how to improve academic programs or operations.

The purpose of a site visit is to review four performance indicators:

- 1. Faithfulness to the charter**
- 2. Students' opportunities to learn**
- 3. Instructional leadership**
- 4. Organizational viability**

Site visits vary in length depending on the size, location, age, and/or specific conditions of a particular school. Site visits take place prior to opening, shortly after opening, in the Winter and Spring of the first through third years and may be conducted at additional times when deemed necessary by MCPSC. Site visit may be done virtually at the discretion of MCPSC staff. If a virtual site visit will be conducted the virtual site visit protocol should be used (found at: <https://mcpSC.mo.gov/starting-a-school/standards-policies-and-practices>) An additional and more extensive multi-day SQR visit will occur at the beginning of the fourth year. Data and information collected from site visits, as well as what is collected throughout the years of the charter, will be used by MCPSC to determine if the charter will be renewed, placed on probation, or closed. While site visits will lead to decisions about renewal, it is important to know that accountability decisions may be required prior to renewal processes if evidence points to deficits in the school's performance. These decisions may include the imposition of conditions, probation, or revocation.

Part II: Roles and Responsibilities

In order to develop an accurate portrait of a school, all participants have key roles in preparing for, and conducting, the site visit. This section explains the roles and responsibilities of the Site Visit Team Leader, team members, and the school. All team members are subject to a Family Registry check and must update it annually.

Code of Conduct

The Site Visit Team is guided in its work by a code of conduct. Adherence to the code of conduct improves the quality of the site visit; schools do not provide reliable evidence under unnecessary stress. Adherence to the code of conduct also creates a frank, professional tone in which the Site Visit Team and the school may discuss key strengths and areas for improvement.

Code of Conduct for Reviewers¹

1. Carry out work with integrity.
 - a. Treat all those you meet with courtesy and sensitivity. Try to minimize stress.
 - b. Allay anxiety through mutual respect and valuing opinions. Show an interest in what is said.
 - c. Focus attention and questions on topics that will reveal how well students are learning.
 - d. Assure information is not attributable to any specific person.
2. Act in the best interests of students and staff.
 - a. Do not put students or staff in a position where they may have conflicting loyalties.
 - b. Emphasize that students come first and are at the center of the review.
 - c. Whenever possible, work to others' convenience.
 - d. Be supportive and enabling. Evidence given under undue stress is unreliable.
 - e. Under no circumstances, criticize the work of a teacher or anyone else involved with the school.
 - f. Teacher interviews and focus groups are confidential. Any information reported to the site visit team will remain anonymous in both oral and written reports.
 - g. Try to understand what teachers are doing and why. Be supportive.
3. Be objective; base findings on evidence, not opinion.
 - a. An individual's perception can be evidence, especially if supported by others' observations.
 - b. Findings must be robust, fully supported by evidence, defensible, and must inform key questions.
 - c. Findings must be reliable in that others would make the same finding from the same evidence.
 - d. Be prepared to ask questions to establish whether a view is based on opinion or evidence. This applies, as well, to site visit team members' findings.
 - e. Discussion with staff and site visit team members is part of the process to create a fair and secure evidence base from which corporate findings are made.
 - f. If a given piece of evidence is not affecting students' learning or experience, it is then irrelevant.

¹ Adapted from the Massachusetts Charter School Office Site Visit Protocol and the OFSTED code of conduct.

Key Terms

Site Visit Team Leader	The team leader for the visit will be the school's liaison from MCPSC. This person is responsible for all communication with the school, including scheduling, requesting pre-visit documents from the school, determining a schedule for the visit (in consultation with the school leader or designee), assembling pre-visit materials for the team, preparing the team for the visit, leading the visit, and writing the resulting site visit report.
Site Visit Team Member	Site visit team members are responsible for reviewing the preparation materials that are sent to them by MCPSC. Team members participate in a webinar training, read over the provided materials, arrive at the site visit with an understanding of the background of the school, and are prepared to share initial impressions or questions with the team. Team members are required to review and follow the Code of Conduct during the visit.
Site Visit Team	The Site Visit Team is comprised of the Site Visit Team Leader and Members.
Site Visit Protocol	The Site Visit Team utilizes this document – the MCPSC Site Visit Protocol – to guide its work. This Protocol is also designed to be a resource for charter school leaders, external site visitors, MCPSC staff, and contracted vendors who may conduct site visits for MCPSC. It explains site visit processes, roles and responsibilities of all parties, and expected outcomes. The Protocol is meant to provide useful information about site visits so stakeholders and visitors know what to expect and how to prepare.
School Site Visit Coordinator	The school leader will act as or designate someone to be the coordinator and liaison for the visit. The visit coordinator should be knowledgeable of the school's schedule, be able to communicate quickly with various stakeholders and work with colleagues to resolve any scheduling issues. The Commission works with the designated person to ensure that key documents submitted through Epicenter are complete approximately four weeks prior to the visit. Additional site visit preparation includes setting the schedule, organizing the appropriate stakeholders for focus groups and coordinating logistics.

Site Visit Team Leader

Roles and responsibilities of the team leader include:

1. Modeling and enforcing the code of conduct
 - Site Visit Team Leaders should exhibit the highest professional standards and are responsible for ensuring that their team does so, as well.
2. Coordination with the school
 - Before the visit, the Site Visit Team Leader contacts the school to ensure that documents are made available in a timely manner.
 - The school is likely to have questions about the process. The team leader should serve as the school's contact person to address these questions.
 - The team leader ensures that the school has secured adequate meeting space for the team.
 - The team leader ensures that lunch will be provided (at the team's expense) each day.
3. Coordination of materials and assignment of site visit team members
 - Before the site visit, site visit team members are selected and provided with materials (e.g., Site Visit Protocol, school documents) to review.
 - Once the site visit schedule has been established, the team leader assigns team members to conduct interviews.
4. Facilitation and management of logistics for the site visit days
 - Once on site, the Site Visit Team Leader is responsible for facilitating all team meetings.
 - The team leader ensures that all interviews and focus groups are attended and go smoothly and conducts a daily review of the interview schedule with school leadership and the team.
5. Communication with the school while on site
 - The Site Visit Team Leader is responsible for maintaining good channels of communication with the school at all times.
 - The team leader takes appropriate actions to follow up on any responses to the team's findings.
6. Reporting
 - The Site Visit Team Leader writes and/or oversees the writing of the site visit report, ensuring that the report contains sufficient evidence.

Site Visit Team Members

Success of the visit relies heavily on site visit team members':

1. Adherence to the code of conduct
 - Teacher interviews and focus groups are not attributable. Any information reported to the team will remain anonymous.
2. Preparation for the site visit
 - Site Visit Team members review the Site Visit Protocol in its entirety. This is critical because the protocol guides all activities while on site.
 - Team members review documents and formulate questions for the initial team meeting prior to arriving on site.
3. Collection of evidence
 - Site Visit Team members complete the site visit schedule according to the protocol and under the direction of the team leader.

- Team members secure their evidence in notes and provide all necessary data to the team leader at each team meeting:
 - Notes are completed and organized in a timely manner for end-of-day meetings
- 4. Collaborating with others under the Site Visit Team Leader's direction
 - Team members support and take direction from their team leader. They recognize that the team leader has to make executive decisions and trusts in his/her judgment.
 - Team members actively participate in team meetings and support others' efforts to reach unified findings based on evidence.
- 5. Reporting
 - Site Visit Team members provide feedback on the draft of the site visit report in accordance with pre-established timelines, ensuring that the report contains sufficient evidence.

School Site Visit Coordinator and School

To be an effective partner in the process, the school:

1. Assigns one person to serve as the School Site Visit Coordinator
 - Serves as a liaison with the Site Visit Team Leader and the school community
 - Responsible for building the site visit agenda, in conjunction with the Site Visit Team Leader
2. Acts as an essential partner in the site visit process
 - The school makes the purpose and process of the Site Visit Team Leader's visit clear to all faculty and staff.
 - The school welcomes the Site Visit Team and recognizes its efforts on behalf of the school and its students.
 - The school works with the team to ensure that the visit runs smoothly.
 - The school engages faculty and other stakeholders to reflect on the school's performance.
3. Designates a meeting room
 - The Site Visit Team will need a meeting space during the day to hold focus groups.
4. Communicates with the Site Visit Team
 - School leadership works collaboratively with the team leader prior to the site visit to ensure that documents are provided in a timely manner and that school staff are aware of the visit and its purposes (see Appendix A).
 - School leadership works collaboratively with the team leader during the site visit to provide any additional documents requested and to ensure the completion of surveys, if applicable.
 - School leadership maintains good communication with the team leader throughout the process, honestly expressing concerns and feedback from staff.
5. Report feedback and review
 - School leadership responds honestly and frankly to the site visit team's developing findings by stating the school's position and making available additional evidence to support its position, should it differ from other members of the team.
 - School leadership completes a factual review of the draft site visit report and, in accordance with pre-established timelines, provides factual feedback to the team leader.

Part III: Process

Site Visit Preparation

1. The Site Visit Team Leader (as determined by MCPSC) communicates with the school to determine site visit dates and introduces school leadership to the Site Visit Protocol. MCPSC conducts site visits between January and April. Once the school leader confirms the date of the site visit, the school should relay that information to all relevant stakeholders and ensure regular programming will take place. **No testing, field trips, or other events outside of the normal academic program should be conducted on the day(s) of the visit. Once the date has been confirmed, MCPSC considers it finalized, barring an emergency.**
2. The school leader will act as or designate someone to be the coordinator and liaison for the visit. The School Site Visit Coordinator should be knowledgeable of the school's schedule, be able to communicate quickly with various stakeholders and work with colleagues to resolve any scheduling issues. The Site Visit Team Leader works with the School Site Visit Coordinator to begin establishing a specific schedule for the site visit. The Site Visit Team Leader remains available to answer any questions and to work with the school to ensure the documents needed for the site visit are available in a timely manner.
3. The School Site Visit Coordinator creates a draft schedule of interviews, finalizes the schedule with the Site Visit Team Leader's input and sends a copy of the schedule to the school and members of the team.
4. The school ensures that all preparation has been completed prior to the site visit (see Appendix A). MCPSC will work with the School Site Visit Coordinator to ensure that key documents submitted through Epicenter are complete approximately four weeks prior to the visit.
5. The Site Visit Team Leader sends a copy of the protocol, the schedule, interview questions, and documents for pre-visit analysis to the other team members and MCPSC.

On-Site Review and Feedback

Time on site moves from a fixed structure designed to ensure good coverage of the school to a more flexible schedule that allows the team to follow up on emerging trends and findings. Since it is not possible to predict what will emerge from the evidence collected, the team requires some flexibility. However, as a matter of courtesy and in the spirit of developing and maintaining a good working relationship, the team leader works with the school to define as much of the schedule as possible without restricting the team's ability to pursue important evidence.

1. The Site Visit Team reviews documents and conducts interviews in accordance with the visit schedule.
2. The Site Visit Team Leader keeps the school's leadership informed of the team's progress throughout the visit, providing updates on the team's findings as they develop. This ensures that the school has every opportunity to present evidence to address the team's questions.
3. The Site Visit Team will formulate consensus findings that respond to the key questions, criteria, and indicators in the Site Visit Protocol. This is based on evidence provided to the team during interviews and document reviews while on site.
4. At the end of the visit, a brief report of the Site Visit Team's findings is presented verbally to school leadership.

Sample Daily Site Visit Schedule

Below are some sample site visit schedule. Schedules will vary from school to school, depending on the size of the school and the number of site visit team members. The team leader will work to construct a daily schedule for the site visit, based on schedule documents and guidance provided by school leadership. The site visit may be divided and take place over the course of two days.

Time	Action Item
7:30 – 8:00 a.m.	Site visit time arrives; morning meeting
8:00 – 9:00 a.m.	Interview with school leader
9:00 – 9:45 a.m.	Parent focus group
9:50 – 10:20 a.m.	Student focus group
10:20 – 11:00 a.m.	Dean of Students and Assistant Principals
11:00 – 11:45 a.m.	Director of Operations meeting/checklist review
11:45 a.m. – 12:45 p.m.	Lunch on campus
12:45 – 1:30 p.m.	Special Education/ELL staff focus group
1:30 – 2:15 p.m.	Teacher focus group
2:20 – 3:00 p.m.	Teacher focus group
3:00 – 3:45 p.m.	Student Support Staff
4:00 – 5:00 p.m.	Board of Directors focus group
5:00 – 7:00 p.m.	Board of Directors regularly scheduled meeting

Time	Action Item
12:30 – 1:00 p.m.	Site visit time arrives; walks the school
1:00 – 2:00 p.m.	Interview with school leadership
2:00 – 3:00 p.m.	Teacher focus group
3:00 – 3:45 p.m.	Administration focus group
4:00 – 5:00 p.m.	Board of Directors focus group
5:00 – 7:00 p.m.	Board of Directors regularly scheduled meeting
Next Day	
8:00 – 8:45 a.m.	Parent focus group
8:45 – 9:30 a.m.	External Stakeholder focus group
9:30 – 10:15 a.m.	Special Education/ELL staff focus group
10:15 – 10:45 a.m.	Director of Operations meeting/checklist review
10:45 – 11:30 a.m.	Teacher focus group
11:30 – 12:00 p.m.	Exit Interview with school leadership

Focus Groups & Interviews

A number of focus groups and interviews must be scheduled for the day of the site visit. It is the school's responsibility to gather a representative group from each category through an open invitation and to inform each participant of the time and place of the meeting. MCPSC expects that each participant is present for the entirety of the meeting and is given complete freedom to speak regarding their knowledge of and experience at the school, with no limits or repercussions imposed. Interviews are with all members of a specific group. All members of the participant groups should be invited to participate. Focus group composition should not include more than 10 individuals. The School Site Visit Coordinator will assure that each focus group contains a representative sample of

the participants. Individuals may attend only one focus group session. If the number of parents, stakeholders and/or teachers who volunteer to take part in the focus group greatly outnumber the available seats, the school should contact the Commission to request additional members be added to a specific group or additional focus group times be added to the schedule. Administrators, CMO, and board may not be present at any meeting other than their specific group.

Participants	Description	Time/When
Governing Board	An interview with all members of the governing board. Remember, a quorum of the board of trustees or any subcommittee of the board falls within the scope of the Missouri Sunshine Law (Chapter 610 of the Missouri State Statutes.) The school leader may not attend this meeting.	Observation of a regularly scheduled board meeting. Interview with all members either before or after the board meeting. Time: One hour
School Leadership/Administration	Administrators who are directly and primarily responsible for the academic program and the operation of the school should attend this meeting. The time reserved for wrap-up may be used to meet with these administrators to clarify issues, concerns, or questions. Schools operated by a CMO may be asked to include a representative as either part of the site visit or make them available for a phone call with the team.	Head of School/Executive Director/Principal - twice during the course of the visit (once at the beginning of the process and once at the end of the process) Time: One hour at the beginning of the site visit and 30 minutes at the end of the visit All others in leadership roles – one time during the course of the visit. Time: One hour
Special Education/ELL Administrator(s)	The school's special education and ELL program administrators will be interviewed. The time reserved for wrap-up may be used for supplemental meetings with these administrators as needed to clarify issues, concerns, or questions which arise during the course of the visit.	Time: 45 minutes to one hour
Special Education/ELL Staff	Special education teachers, interventionists, paraprofessionals, and ESL teachers will be interviewed. The focus group should contain a representative sample of staff in terms of their experience, years at the school, and/or grade level served. Do not include teachers who are directly responsible for supervising/evaluating other teachers.	Time: 45 minutes to one hour
General Education Teachers	All general education teachers should be offered the opportunity to participate. The focus group should contain a	Time: One hour

	representative sample of teachers in terms of their experience, years at the school, subject, and/or grade level. Do not include teachers who are directly responsible for supervising/evaluating other teachers.	
Students	Student focus groups (4 th grade and above) should represent a variety of ages, grade levels, and time spent at the school.	Time: 30 minutes
Families	This focus group should include parents or guardians whose children represent a variety of grades, years spent at the school, and, if possible, parents/guardians of students with diverse learning needs.	Time: 45 minutes to one hour
Student and Family Support Services	This focus group should include student support services staff including but not limited to: family support and outreach staff, guidance and counseling staff, dean of students, social worker, school psychologist, nurse, a crisis management team member, discipline coordinator, and/or community services liaison, if applicable. Please do not include supervisors and supervisees in the focus group together.	Time: 45 minutes to one hour
External Stakeholders (optional)	This focus group should include external partners and community services delivering services during the school day or in concern with out of school time activities connected to the school's mission.	Time: 30 – 45 minutes

Written Report

1. The Site Visit Team Leader or team member responsible for completing the written report gathers all notes and other key evidence that have been collected by the team during the site visit to use in drafting the report.
2. The writer develops a draft report that documents the evidence for the findings. This report provides a written record of the findings reported to school leadership orally at the end of the site visit.
3. Before it is sent to the school, all team members provide comments on the draft written report according to pre-established timelines.
4. The school reviews the draft for factual errors.

Part IV – Performance Criteria and Indicators

The following key questions guide the Site Visit Team's work in the school. All evidence is collected in response to these key questions.

Criteria 1: Faithfulness to Charter

- Is the school faithful to its mission? Does it implement key design elements outlined in its charter?
 - Operations are in alignment with its mission as stated in its charter.
 - All stakeholders share a common and consistent understanding of the school's mission and educational plan as outlined in the charter.
 - The school has fully implemented the educational plan in the approved charter.
- Does the school meet its performance contract goals?
- Does the school ensure program access and equity for all students eligible to attend the school?
 - Student recruitment and retention plan includes and deploys deliberate, specific strategies to ensure the ongoing provision of equity before, during, and after enrollment.
 - If student populations are not comparable to district student populations, the school eliminates barriers to program access.
 - Information regarding non-discriminatory enrollment practices and the availability of specialized services are readily available to parents, students, and the general public.
- Does the school provide public schools (district and charter) in the region with access to its best/promising practices and/or innovation?

Criteria 2: Students' Opportunities to Learn

- Does the school consistently meet academic growth, proficiency, and college and career readiness?
 - Performance standards articulated in the performance contract and/or Missouri student performance standards.
 - Assessment systems are:
 - In place and aligned to curriculum.
 - Rigorous and scheduled.
 - Regularly used to impact student achievement.
 - Curriculum is:
 - Aligned to Missouri Learning Standards.
 - Reviewed and revised regularly to ensure quality and effectiveness.
 - Aligned vertically between grades and horizontally across classrooms at the same grade level.
- Does the school identify and support students with a full range of needs?
 - The school has formalized structures for identifying students needing additional support and systematically monitors student progress and program effectiveness.
 - The school's intervention system allows students to move along a continuum of

- services and change placements according to identified progress or needs.
 - The school provides appropriate supports for students with special needs, particularly those students identified with disabilities and those with limited English proficiency.
- Does the school have a safe, supportive learning environment that reflects high expectations for all students?
 - The school holds high expectations for academic learning.
 - The school provides a safe and orderly learning environment that supports fulfillment of the educational goals.
 - The school provides opportunities for students to form positive relationships with peers and adults in the school.
- Does the school provide a respectful learning environment that engages families?
 - The school includes parents/guardians in cultivating a culture of high expectations for students' learning and their consistent support of students' efforts.
 - The school provides opportunities for families to engage with the school.
 - Educators communicate with parents/guardians about instructional programs and students' academic progress.

Criteria 3: Instructional Leadership

- Does the school design professional development and collaborative systems to sustain a focus on instructional improvement?
 - Professional development (PD) is designed to address school priorities, school improvement goals, and/or identified areas of need.
 - Professional development is active, intensive, and sustained.
 - Professional development is evaluated.
 - Educators collaborate regularly to learn about effective instruction and students' academic performance.
 - Trained mentors provide beginning teachers with sustained, job-embedded instruction.
- Does the school's culture indicate high levels of collective responsibility, trust, and efficacy?
 - Educators' mindsets and beliefs shared commitments to students' learning.
 - The school reflects a safe, trustworthy and growth-oriented professional climate.
 - School leaders create conditions that support educators' learning culture.
- Do school leaders guide and participate with instructional staff in the central processes of improving teaching and learning?
 - School leaders establish a vision aligned to students' long-term success and set clear goals to meet that vision.
 - School leaders ensure that the school has a coherent, comprehensive, and aligned curriculum.
 - School leaders ensure that teachers deliver high-quality instruction.
 - School leaders provide conditions that support school-wide data culture.
- Are there clearly defined and delineated roles including but not limited to staff and administration, administration and governance, parent and administration? Are these roles

understood by all stakeholders?

Criteria 4: Organizational Viability

- Does the school maintain a sound and sustainable financial condition and operate in a financially sound and publicly accountable manner?
 - The school demonstrates near-term financial health.
 - The school demonstrates financial stability.
 - The school has sound financial management practices.
 - The school has implemented systems and procedures to ensure sound financial management practices.
- Does the school have effective operational systems and structures in place?
 - The school's operations support the smooth running of its program, via strong systems for maintaining compliance.
 - The school has implemented plans and systems that ensure effective and efficient operations.
 - If applicable, the Network provides valuable and effective operational support.
 - The school successfully supports student recruitment efforts and effectively builds community relationships that marshal support for its work.
 - The facilities meet the needs of schools and are financially viable.
- Do members of the governing board act as public agents authorized by the Missouri State Board of Education and provide competent and appropriate governance to ensure the success and sustainability of the school?
 - The Board provides strong oversight over the effectiveness of the academic program.
 - The Board provides strong financial oversight.
 - The Board ensures legal compliance and public disclosure.
 - The Board maintains effective governance practices (rather than management) to ensure organizational viability, including the systematic selection and oversight of the school leaders.
 - The board engages in strategic and continuous improvement planning by setting and regularly monitoring progress relative to goals/priorities that are aligned with the school's mission, vision and core values, including but not limited to:
 - Strategic planning
 - Process, procedures, and implementation of self-evaluation.
 - Recruiting, selecting, and training members with needed skills and expertise.
 - Process, procedures, and implementation of charter management organization (CMO) evaluation, if applicable.
 - Succession planning for board and school leadership.
- Does the school compile a record of compliance with the terms of its charter and applicable state and federal laws and regulations?
 - The school maintains a 3% fund balance.
 - The school completes an annual audit.
 - The school supplies DESE with the Annual Secretary of the Board report (ASBR).

- The school makes available to the public financial and audit reports, including posting to the school's website.
- Board members are active and engaged in fulfilling their legal responsibilities and obligations to the school including, but not limited to:
 - Following Sunshine Laws.
 - Following the board's bylaws and policies.
- If applicable, does the CMO provides competent and appropriate management of the school?
 - The board ensures a contract with the CMO is appropriately executed.
 - There is an appropriate working relationship between governing board, school leadership of the school, and the CMO.
 - The board conducts an evaluation of CMO personnel on site.
 - Staff, external partners, and parents clearly understand the role and responsibilities and relationship of the board, school leaders, and the CMO.

Appendix A

Checklist for School Site Visit Coordinator

As soon as you receive the email from MCPSC to schedule the site visit:

- ☐ Check that the suggested site visit dates are a regular school day without any school-wide testing or early release.
- ☐ Confirm the suggested date(s) as soon as possible. Please email your confirmation. If the date creates undue hardship for your school, call the MCPSC staff member who sent the email to find a mutually agreeable alternate date.
- ☐ Once the dates are confirmed, share the site visit dates and the Protocol with all relevant school stakeholders.
- ☐ Review the Site Visit Protocol and share it with the school community.
- ☐ Talk with the school's governing board, staff, and community to orient them to the purpose of the site visit, what their respective roles will be during the visit, and what to expect when the team visits. There will be no classroom observations during a Site Visit.
- ☐ If a quorum of the board of trustees, or a quorum of any subcommittee of the board, is present at the interview, follow all Missouri statutes concerning public meetings.
- ☐ Begin the process of assuring all required pre-visit documents are uploaded in Epicenter.

Approximately two weeks prior to the visit:

- ☐ Confirm all pre-visit documents are in Epicenter,
- ☐ Work with the Site Visit Team Leader and the school community, including the governing board of trustees, to determine the schedule for the visit. This may take several iterations to complete.
- ☐ Speak with the Site Visit Team Leader by telephone to review and finalize the site visit schedule, focus group attendees as well as discuss logistics and materials. Please ask questions about the site visit and the protocol at this time.
- ☐ Confirm focus group participation from board members, teachers, students, families, and staff using the focus group attendees template sent by the team leader.
- ☐ Upload into Epicenter the Focus Group Attendees list using the MCPSC template.

During the visit:

- ☐ Begin the visit with an initial interview. Assist the team in obtaining any additional information, documents, data, or interviews with school staff. Other documents, such as fiscal or planning documents, may be requested during or following the visit.
- ☐ Bring concerns and questions to the attention of the team leader as they arise.
- ☐ Attend the report out meeting to hear the team's initial report out.

After the visit:

- ☐ Work with the school's leadership team to review and provide factual corrections, or other feedback, on the draft site visit report.
- ☐ If deemed necessary, prepare a response to the final report. This response will be appended to the report.
- ☐ Share the final, public site visit report with staff, parents, board members, and the school community.



Charter School Administration Compliance Checklist

Lottery/Enrollment	Y	N	NA	Comments
School has written policy that clearly states random selection process				
Applications ranked using random selection				
Wait list				
Back fills				
Clearly defined allowable exceptions				
Evidence lottery was used in current school year				
All students entered into MOSIS				
MOSIS data reviewed for accuracy				
School corrected errors and responded to warnings				
Evidence students reside in eligible district				
Evidence student meets age eligibility				
School Safety	Y	N	NA	
Certificate of Occupancy				
Physically and emotionally safe environment				
Student and Employee Records	Y	N	NA	
Records stored in secure area				
Access restricted to only necessary personnel				
Records well organized				
FERPA policies in place				
Students identified * serviced for qualifying special programs				
Policies and Procedures	Y	N	NA	
Student handbook available				
Employee handbook available				
Parent grievance policy available				
Are any fees charged?				
Documentation that only eligible students are attending				
Medication located in secure area				
Procedures for distribution of student medication				
Board/Governance Compliance	Y	N	NA	
Board members resume and background checks				
All board seats filled				
Compliance with MO Open Meeting Laws				
Board is meeting as scheduled				
Related-party transactions				
Process of recruiting new board members				
Board members trained				
Evidence that board members review school finances regularly				Note frequency - annually, quarterly, monthly

Evidence that board members review school enrollment – current and projected				Note frequency – annually, quarterly, monthly
Annual budget formally adopted				
Board has a budget committee				
Board has a budget process, including amendments				
Board approves purchases over a certain amount				
Evidence that board members review school academic performance				Note frequency – annually, quarterly, monthly
Employee Record Compliance	Y	N	NA	
All certified & non certified employees, including substitutes have background check and family registry completed, reviewed and on file				
All vendors & contracted employees have background checks and family registry completed, reviewed and on file				
Policy and procedure in place to verify contracted service/vendor have been subject to all appropriate criminal background checks				
All appropriate staff entered into MOSIS				
Finance/Accounting	Y	N	NA	
Policy on purchase orders/requisitions in place and evidence followed				
Account payables up to date				
Disbursements made by check, not cash				
System prevents duplication of payment				
System in place to review accuracy of payments				
Ledger (general and A/P) reconciled and restricted; audit trail in place				
Employee reimbursements have documentation				
Travel policy in place and followed				
Documentation in place for loans/notes				
Contract with provider and/or written accounting policy and accounting procedures				Evidence on vendor held accountable
Inventory of instructional materials				
Assent inventory				
Separate inventory of materials & equipment purchased with federal dollars				
Filed school with Retirement Board and making payments on behalf of employees				
Employee payroll list without duplications				
Payroll reconciled to general ledger, including withholdings				
Access to payroll check and other check stock restricted				
Process for changing an employee's salary require				

more than one person				
All payroll taxes filed and paid on behalf of employees				
Timesheets verified				
Credit card policies and procedures				
Check preparer prohibited from signing				
Voided checks retained and examined				
Check amount agree with supporting data				
Bank statements reconciled, on a timely basis by people now having receipt/disbursement responsibilities				
Segregation of duties regarding cash, receipts, disbursement, deposits, record keeping and reconciliation				
Cash secured				
Check and cash receipts itemized				
Deposits made daily				
Student Attendance	Y	N	NA	
All students entered into MOSIS				
MOSIS data reviewed for accuracy				
School corrected errors and responded to warnings				
Procedures for students who arrive late				
Procedures for changing attendance record, including who can make the change				
Source documents for changes in attendance				
Procedures for teacher supplied attendance				
Attendance reports reviewed and reconciled				
Procedures for certifying attendance submitted to DESE				
Enrollment, attendance records reconciled with MOSIS				
Attendance procedure manual				
Procedures to assure students are eligible for enrollment				
Attendance by subgroup provided to board and leadership				
Procedures to capture National School Lunch and Breakfast program data				

Site Visit Focus Group/Interview Guide

Criteria 1 - Fidelity to Charter	
Is the school faithful to its mission? Does it implement key design elements outlined in its charter? - Operations are in alignment with its mission as stated in its charter. - All stakeholders share a common and consistent understanding of the school's mission and educational plan as outlined in the charter. - The school has fully implemented the educational plan in the approved charter.	All: - What is the school's mission? - What do you see your school doing to meet its mission? - Do you think the mission of the school is still relevant/accurate? Parents: - Why did you enroll your child(ren) at this school? How long have you been a parent at this school? - Did you participate in the MCPSC focus group last year? - What is the school's mission?
Does the school meet its performance contract goals?	Leadership/Board: - How are you tracking progress towards the goals in your performance contract? - What were the board's goals this year for the school? How are they measured? How do you monitor your progress? - Where are you in implementation of your strategic plan? How was the strategic plan created and who monitors implementation? Teachers/Support Staff: - Do you know what the school's goals are specifically in regards to academics? - Where are you in implementation of your strategic plan? How was the strategic plan created and who monitors implementation? Parents: - What are the school's goals? Has the school met its goals?
Does the school ensure program access and equity for all students eligible to attend the school? Student recruitment and retention plan includes and deploys deliberate, specific strategies to ensure the ongoing provision of equity before, during, and after enrollment.	All: - How does the school ensure program access and equity for all students eligible to attend the school? - What are the recruitment and enrollment goals and processes of the school? – leadership, board, teachers (?), support staff (?)

• The school successfully supports student recruitment efforts and effectively builds community relationships that marshal support for its work. • If student populations are not comparable to district student populations, the school eliminates barriers to program access. • Information regarding non-discriminatory enrollment practices and the availability of specialized services are readily available to parents, students, and the general public.	Parents: • Can you describe the recruitment and enrollment process to us? • Do you know or know where to find what the schools non-discriminatory enrollment practices are? • Do you know or know where to find the schools availability of specialized services?
Criteria 2 – Students’ Opportunities to Learn	
Does the school consistently meet academic growth, proficiency, and college and career readiness? • Performance standards articulated in the performance contract and/or Missouri student performance standards. • Assessment systems are: ○ In place and aligned to curriculum. ○ Rigorous and scheduled. ○ Regularly used to impact student achievement. • Curriculum is: ○ Aligned to Missouri Learning Standards. ○ Reviewed and revised regularly to ensure quality and effectiveness. ○ Aligned vertically between grades and horizontally across classrooms at the same grade level.	All: • How would you classify the current state of the school’s academic performance? • What tools do you have at your disposal to understand the academic performance of the students in this school? • What do you believe are the reasons that your school isn’t performing at state average? • What assessments are administered and what is the purpose of each (type and frequency; how school leaders use data; how teachers use data)? Board: • How is tracking academic performance operationalized in your board work? • How do you know your curriculum is aligned to state standards? • What are the required actions facing this board to ensure student success? Do you have a theory of change for improving academic performance?
Does the school identify and support students with a full range of needs? • The school has formalized structures for identifying students needing additional support and systematically monitors student progress and program effectiveness.	All: • Can you describe how the school identifies and supports students with a full range of needs (i.e. process for students needing academic and behavioral support; available supports and services offered; approach to progress monitoring; use of disaggregated data)?

• The school's intervention system allows students to move along a continuum of services and change placements according to identified progress or needs. • The school provides appropriate supports for students with special needs, particularly those students identified with disabilities and those with limited English proficiency.	• How do teachers know where students are struggling and where they are doing well? Students: • How do you see the school supporting you or your classmates academically?
Does the school have a safe, supportive learning environment that reflects high expectations for all students? • The school holds high expectations for academic learning. • The school provides a safe and orderly learning environment that supports fulfillment of the educational goals. • The school provides opportunities for students to form positive relationships with peers and adults in the school.	All: • How would you describe the culture of the school? • What are the school's expectations around both behavior and academics for students? Board: • Describe the measures the board has put in place to ensure the safety of students and school staff (investment in security personnel or equipment; training for staff and students). Parents: • Do you think your child's teachers hold them to high standards? • How is this school preparing your child for success at their next school? Students: • What is it like to walk down the hallways? Do you feel safe here? • What are the expectations while you are in class? • Do you think your teachers hold you to high standards? • How is this school preparing you for success at your next school?
Does the school provide a respectful learning environment that engages families? • The school includes parents/guardians in cultivating a culture of high expectations for students' learning and their consistent support of students' efforts. • The school provides opportunities for families to engage with the school. • Educators communicate with parents/guardians about	All (except students): • Describe the school's approach to working with families. • Describe communication between families, teachers, and school leadership. Students/Parents: • How do you see your school engaging with your family? • How do you/your parents know how your child/you are doing in school?

instructional programs and students' academic progress.	Do you know what to do if you had an issue with your child's teacher or another staff member?
Does the school provide public schools (district and charter) in the region with access to its best/promising practices and/or innovation?	Leadership/Teachers: - How do you know and share with your staff/peers are some of the best/promising practices in public education generally? - How do you share what is working and what you are doing well with other schools in the region?
Criteria 3 – Instructional Leadership	
Does the school design professional development and collaborative systems to sustain a focus on instructional improvement? - Professional development (PD) is designed to address school priorities, school improvement goals, and/or identified areas of need. - Professional development is active, intensive, and sustained. - Professional development is evaluated. - Educators collaborate regularly to learn about effective instruction and students' academic performance. - Trained mentors provide beginning teachers with sustained, job-embedded instruction.	All (except parents/students): - Describe the school's approach to professional development (PD)? - Is the PD you receive helpful? What could make it more helpful to your practice? How do you know if the PD is helpful? - Is the PD you receive timely? Does it cover issues or practices that are relevant and can be implemented to improve your practice immediately?
Does the school's adult culture indicate high levels of collective responsibility, trust, and efficacy? - Educators' mindsets and beliefs shared commitments to students' learning. - The school reflects a safe, trustworthy and growth-oriented professional climate. - School leaders create conditions that support educators' learning culture.	All: Describe the professional working climate in the building.
Do school leaders guide and participate with instructional staff in the central processes of improving teaching and learning?	All: In what ways do you see the school monitor and work to continuously improve teaching and learning (academic vision,

• School leaders establish a vision aligned to students' long-term success and set clear goals to meet that vision. • School leaders ensure that the school has a coherent, comprehensive, and aligned curriculum. • School leaders ensure that teachers deliver high-quality instruction. • School leaders provide conditions that support school-wide data culture.	goals, progress monitoring; coherent and aligned curriculum; high-quality assessments; feedback to teachers; school-wide data culture)? Leadership/Teachers/Support Staff: • How would you characterize the relationship between [insert group] and the school leader? • How would you characterize the relationship between [insert group] and the board? Board: • In what ways does the board ensure leadership monitors the educational program (i.e. curriculum, instruction, professional development, etc.)? What is reported to the board in these areas?
Does the school hold staff accountable and create systems for continuous improvement where needed? • Staff understands how, when and why they are evaluated. • Staff establish goals for their performance with appropriate opportunities for feedback and improvement. • Staff understand expectations of performance.	All (expect students/families): • How would you characterize the relationship between your board and your school leader? • What is the board's policy on evaluating the school leader, including rubric and timing? When did you last evaluate the CEO/Superintendent/Executive Director? • Do you have goals for your performance? How were they developed? How are they measured? What is the risk/reward connected to performance? • What is the school's process for holding staff accountable? Hiring? • What is the school's annual teacher retention rate?
Criteria 4 – Organizational Viability	
Does the school maintain a sound and sustainable financial condition and operate in a financially sound and publicly accountable manner? • The school demonstrates near-term financial health. • The school demonstrates financial stability. • The school has sound financial management practices. • The school has implemented systems and procedures to ensure	All: • What indicators demonstrate the school is financially sound and sustainable (near-term financial health, financial stability, financial management practices, systems and procedures)? • Are there sufficient resources to meet the needs of the students and performance goals of the school? • How are the school's resources aligned to goals? • Are you involved in budget meetings/discussions? What is your role in determining allocation of school resources?

sound financial management practices. • The school is appropriately resourced and resources are aligned to the goals.	Board: • Given where you are academically, where do you think you all should increase investment? Do you have a plan for this?
Does the school have effective operational systems and structures in place? • The school's operations support the smooth running of its program, via strong systems for maintaining compliance. • The school has implemented plans and systems that ensure effective and efficient operations. • Are there clearly defined and delineated roles including but not limited to staff and administration, administration and governance, parent and administration? Are these roles understood by all stakeholders? • If applicable, the Network provides valuable and effective operational support. • The facilities meet the needs of schools and are financially viable.	All: • How would you describe operations at the school? Do things run smoothly with the proverbial trains running on time or are there a lot of systems and processes that still need improvement? (systems, structures, and routines; targeting resources; adjusting resources to meet needs of student population; communication and decision making processes; financial and operational systems and processes; clear roles and responsibilities)? • Are roles and responsibilities appropriately defined and delineated?
Do members of the governing board act as public agents authorized by the Missouri State Board of Education and provide competent and appropriate governance to ensure the success and sustainability of the school? • The Board provides strong oversight over the effectiveness of the academic program. • The Board provides strong financial oversight. • The Board ensures legal compliance and public disclosure. • The Board maintains effective governance practices (rather than management) to ensure organizational viability, including the systematic selection and oversight of the school leaders. • The board engages in strategic and continuous improvement planning by setting and regularly monitoring progress relative to goals/priorities that are aligned with the school's mission, vision	Board/Leadership: • How often do you and the school leader/board discuss the academic performance? What do you then do about it? • Describe the board's systems and policies around financial controls. • How do you ensure effective operations at the school (school budgeting process, spending priorities, staffing and deployment of human resources, systems and structures)? How does the board ensure that leadership monitors operations? • Describe how the board oversees the school (governance practices rather than management, information about academic program, information about finances, communication from school leaders, recruitment/hiring of chief executive). • Have you read the personnel and student handbooks and are they aligned to your policies?

and core values, including but not limited to: • Strategic planning • Process, procedures, and implementation of self-evaluation. • Recruiting, selecting, and training members with needed skills and expertise. • Process, procedures, and implementation of charter management organization (CMO) evaluation, if applicable. • Succession planning for board and school leadership.	
Does the school compile a record of compliance with the terms of its charter and applicable state and federal laws and regulations? • The school maintains a 3% fund balance. • The school completes an annual audit. • The school supplies DESE with the Annual Secretary of the Board report (ASBR). • The school makes available to the public financial and audit reports, including posting to the school's website. • Board members are active and engaged in fulfilling their legal responsibilities and obligations to the school including, but not limited to: • Following Sunshine Laws. • Following, reviewing and updating (as necessary) the board's bylaws and policies. • The board is made up of a diverse skillset with appropriate term limits and recruitment plans. • The board has a plan for recruiting and onboarding new members. • The board consists of the number of members outlined in the charter or has plans for recruitment. • The board conducts an annual self assessment and then creates plans to fill unmet needs.	Review all appropriate documents prior to the site visit. Ask follow up questions if there are concerns. Board: • Do you have all of the board members outlined in your charter? How do you recruit and onboard new board members? • Have your bylaws changed this year and, if so, why? When was the last time the board reviewed the bylaws? • What process do you have to generate and review board policies? • Have you conducted a board self-assessment? How do you judge the quality of the board?

If applicable, does the CMO provides competent and appropriate management of the school? • The board ensures a contract with the CMO is appropriately executed. • There is an appropriate working relationship between governing board, school leadership of the school, and the CMO. • The board conducts an evaluation of CMO personnel on site. • Staff, external partners, and parents clearly understand the role and responsibilities and relationship of the board, school leaders, and the CMO.	• If applicable, describe the board's relationship with and evaluation of the CMO. • How does the board ensure the contract with the CMO is appropriately executed? Teachers: • What do you see as the role of your CMO? How would you describe this relationship? • Are there avenues to give feedback to the board on the CMO if you wanted to?
---	--